AgLearn Reference Guide - Student

Version 1.0

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INTRODUCTION

AgLearn is USDA's enterprise-wide learning management system (LMS). The system manages all aspects of training within each agency as well as across the department. AgLearn's User Interface is where all USDA employees and non-employees will go to search on available training, plan for learning development, and record all completed training activity. The user may access AgLearn 24 hours a day, 7 days a week at www.AgLearn.usda.gov. What the user has access to, in terms of course offerings, will be determined by what part of USDA he/she belongs.

The AgLearn Student Interface is segmented into the following main sections:

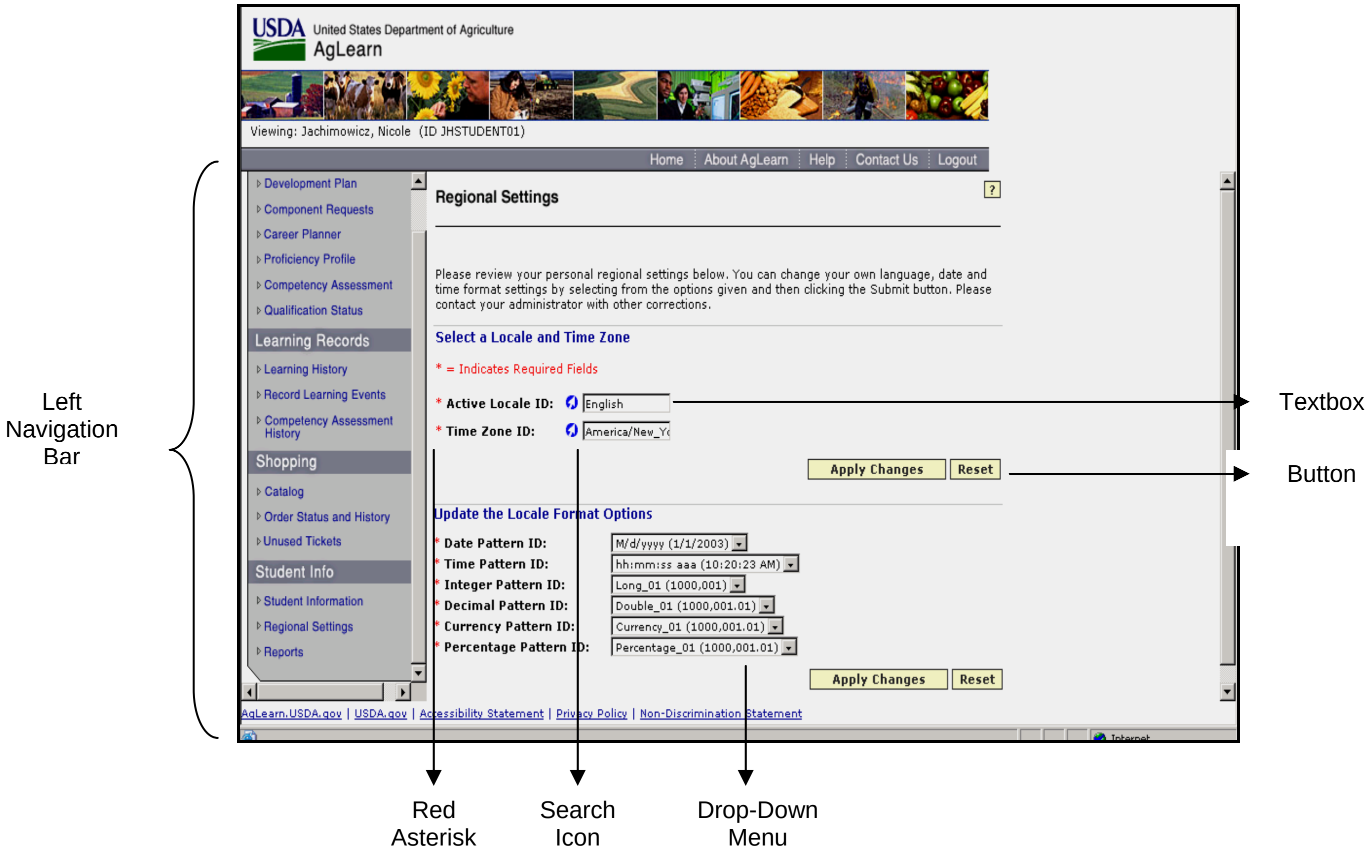
- **Learning**: Scheduling, enrollment, and training (component) requests are included in this section. Users can also access a list of current enrollments and training activities available for their learning needs.

- **Learning Requests**: All Learning Events completed by a user are recorded and can be viewed in this section.

- **Shopping**: This section includes access to catalogs, where a user can view and enroll in training activities.

- **Student Information**: General user information, such as contact and employment information, is managed in this section. Users can also view and run multiple reports.

Note: This AgLearn Reference Guide is designed for USDA employees and non-employees who will use AgLearn to review and update user records, participate in learning activities (including enrollment into scheduled instances and exams), and record the results of learning activities. Within the AgLearn system, users are referred to as 'students'. This guide will refer to a 'student' in the AgLearn system as a 'user'.



AgLearn Student View - Functionality

- **Left Navigation Bar:** Each link represents a function the user can perform within the AgLearn system.
- **Blue Search Icon:** This is the Search Page icon. When a user clicks this icon, a Search Page opens, allowing the user to search for an item. The item selected will populate information into the corresponding field to the right of the icon.
- **Required Fields (*):** Certain textboxes in the AgLearn system require information to be entered in order to process a function. These required textboxes are marked with a red asterisk. Information will not be saved if there are null values in any of the required textboxes.

SECTION I: STUDENT INFORMATION

A user with a valid Student ID and password has access to all of USDA's learning activities and features in the AgLearn system. Information is stored about each user regarding their employment, learning, and personal contact information to help administrators assign training activities and manage learning development. In addition to storing user information in the AgLearn Student Information section, a user can change the format which information in the system is viewed. For example, setting dates and times to the correct time zone and choosing the language that the system displays its information. Reports may also be generated in this section; summarizing user's learning activities and history.

Within the Student Information section, a user can perform the following functions:

- Student Information
  - View Employment and Personal Contact Information from the Student Information page
  - Change a User Password
- Regional Settings
  - View Regional Settings
  - Change Regional Settings
- Reports
  - Run Reports

Student Information

The Student Information page displays current employment and personal contact information relevant to managing a user's learning development. This information is stored in the AgLearn system and cannot be changed by a user except for the user password. If changes need to be made to the Student Information page, please contact the agency's training officer or eLearning point of contact.

Viewing the Student Information Page

From the Student Information page, users can view his/her personal information and ONLY change their login user password.

Viewing the Student Information Page

Step	Action
1.	Click the **Student Information** link on the left navigation bar.
2.	The Student Information page will be displayed.

Below are descriptions for each field shown on the Student Information page.

Student Information: Field Descriptions

Field	Description
Student's Name	User's first name, last name, and middle initial
Student ID	User's login ID to AgLearn
Position	User's job position ID
Location	User's work location
Organization	User's assigned organization
Supervisor or Training Officer	Name of the supervisor/training officer in charge of tracking the user's learning activities
Password	User's password required for login. A user can change his/her password from this field by clicking the **change your password** link.
Comments	Additional information that has been attached to the user's learning record
Contact Information	Information about the user's address, email, and telephone contact information A user's organization may use an email address to send enrollment confirmation letters and other correspondence. If this address is incorrect, important enrollment information may not be received.

Changing a User Password

A user can change his/her password from the Student Information page. When a new password is created, the following USDA eAuthentication formatting criteria must be followed:

- Passwords must be **9 - 12** characters long.
- Passwords must contain the following:
  - At least **1** uppercase letter
  - At least **1** lowercase letter
  - At least **1** non alphabetical character including numbers and the following special characters: ! # - $ % * = + : ; , ? ~
- Passwords CANNOT contain the user's name first or last or user ID.

- Passwords CANNOT contain dictionary words, spaces, tabs, or any other special characters not listed above.

Changing a User Password

Step	Action
1.	Click the **Student Information** link on the left navigation bar.
2.	Click the **Password** link to access the **Change Your Password** page.
3.	Enter the **Old Password** in the **Enter your old password:** textbox.
4.	Enter the **New Password** in the **Enter your new password:** textbox.
5.	Re-Enter the **New Password** in the **Verify your new password:** textbox.
6.	Click the **Apply Changes** button to change the password.
7.	A Microsoft Information Message will pop-up saying, "Password Successfully Change." Click the **OK** button.

Regional Settings: Field Descriptions

The Regional Settings page allows a user to view and change his/her Active Locale **(**Language) and Time Zone settings. This screen also displays the Date, Time, Integer, Decimal, Currency, and Percentage patterns used in AgLearn. Each drop-down menu on the Regional Settings page will indicate the options users are available to choose.

Viewing Regional Settings

Viewing Regional Settings

Step	Action
1.	Click the **Regional Settings** link on the left navigation bar.
2.	The Regional Settings page will be displayed.

Below are descriptions for each field shown on the Regional Settings page.

Regional Settings Field Descriptions

Field	Description
Active Locale	Language used throughout the AgLearn system
Time Zone	Current time zone used in the AgLearn system
Date Pattern	Date format for the way that the date is displayed in the AgLearn system
Time Pattern	Time format for the way that the time is displayed in the AgLearn system
Integer Pattern	Format of whole integers used in the AgLearn system
Decimal Pattern	Format of whole integers with specified decimal places used in the AgLearn system
Currency Pattern	Format of currencies used in the AgLearn system
Percentage Pattern	Format of the percentages used in the AgLearn system

Changing Regional Settings

A user can change the Active Locale ID and/or Time Zone ID from the Regional Settings page. It is important to keep these settings accurate. When scheduling a learning activity for a specific time and date, the regional setting will update the activity's time to reflect the appropriate time zone changes. For example, a user enrolls in a course that is on Oct. 15 at 10:00 EST, but their Time Zone ID is set for Central Time. The course schedule would indicate that the class starts at 9:00 Central Time instead of 10:00 EST.

Changing Regional Settings

Step	Action
1.	Click the **Regional Settings** link on the left navigation bar.
2.	To update the **Active Locale ID**: Enter the new **Active Locale ID** in the textbox. OR Search for the **Active Locale ID**: • Click the Blue Search Icon • Enter the search criteria for the language to be used in the AgLearn system

	• Click the **Select** button on the appropriate ID
3.	To update the **Time Zone ID**: Enter the new **Time Zone ID** in the textbox. OR Search for the **Time Zone ID** • Click on the Blue Search Icon • Enter the search criteria for the Time Zone to be used in the AgLearn system • Click the **Select** button on the appropriate ID
4.	Click the **Apply Changes** button.
5.	(Optional) To update the **Local Format Options**: Under the Update the Locale Format Options section, Click the appropriate selections from the drop-down menu(s).
6.	Click the **Apply Changes** button.

Reports

A variety of reports can be generated and customized to display specific data a user wants to view. Supervisors may run reports on themselves, users under their training supervision, or both. A user is only permitted to run and view reports on their own learning events if they are not a supervisor in the AgLearn system.

Reports are displayed in PDF format and can be printed locally. Below is a description of each report:

Running Reports

To access the **Reports** window, click the **Reports** link on the left navigation bar. A list of report names will be displayed to choose.

- **Component Requests:** This report shows users that have requested components but have not yet been enrolled or waitlisted in a schedule instance of the component.
- **Learning Needs:** This report shows the users' outstanding training requirement(s) for the component (activity) specified. Required dates of training for each activity are also included.

- **Qualification Status:** This report displays the status of the selected user(s) for the selected qualification(s). The report will display qualifications that are complete, incomplete or both.
- **Student Information:** This report displays a repository of employment and personal information on the user.
- **Component status:** This report shows each user's completion status for the components they participated in during the date range specified. If no date range is specified, all records will be included.
- **Development Plan:** This report shows a user(s) list of learning activities that must be complete, and the required dates of completion for each activity.
- **Learning History:** This report shows the learning events in which the user(s) participated in during the date range specified.
- **Learning Hours:** This report shows the total number of "hours" a user has completed.

Running a Report

Steps	Actions
1.	Click the **Reports** link from the left navigation bar. A list of report names will be displayed to choose.
2.	Click the **name (a link) for the report** to run.
3.	Click the appropriate radio button in the **Student** level to choose who to run a report about: • Yourself • Your Subordinates • Both
4.	Click the appropriate radio buttons to **Group By** and **Sort By** the report.
5.	Enter the **Report Title** in the textbox.
6.	Click the **Run Report** button. A window will open with the report.
7.	Printing: To print the report, click **File** on the top navigation bar.
8.	Select **Print** from the drop-down menu.
9.	Select the printing options and click the **OK** button.

SECTION II: LEARNING

Users can manage their learning from one central location in this section. They can view their development plans, monitor their learning initiatives, and enroll in learning activities/events. Within the Learning section, a user can perform the following functions:

- Development Plan
  - View Components and Current Enrollment
  - Enroll in Schedule Instances
  - Delete Components on Development Plan
- Component Requests
  - Request Components
  - View Component Requests
- Qualification Status
  - View Qualification Status and Details

Development Plan

The development plan is a user's central location in the AgLearn system for managing training and learning activities, also known as components and non-components. A component is a unit of learning that is identified and tracked in the LMS. A non-component is a unit of learning that is not tracked in the LMS; however, a user can still enter the learning activity into the AgLearn system and receive credit for training.

The development plan lists the user's enrollment in learning activities that have not been completed. For each learning activity listed under current enrollment, it also shows a set of details outlining the requirements needed for completion. If a user fails to complete an activity successfully, this will also be shown on the development plan.

Viewing Components and Current Enrollment

From the development plan, a list of components (learning requirements) specific to a user's learning development is shown. For example, components may be listed for the user to take training for a specific job position, job location, or job skill.

A user can enroll in a component shown on his/her development plan if not already currently enrolled. Some components may not require the user to enroll. For example, specific online courses do not require a user to enroll before participating. If a user does not have to enroll in the activity, he/she may access the online course directly from the **Launch** button on the development plan.

Viewing Components

Step	Action
1.	Click the **Development Plan** link on the left navigation bar.
2.	Select from the Filter drop-down menu: **Component.**
3.	A list of components available to the user will be displayed.
4.	To view the Component Details, Click the **Component Title** link, a new window will display its details.
5.	To view the Component's Schedule, Click the **See Schedule** link, a new window will display its schedule.
6.	To view the Content Objects associated with the Component, click the **Launch** link and a new window will display its content objects. A **content object** stores information about where/how to access an online course.
7.	To view enrollment status, Click the **Enrollment Status** link and a new window will display the course start/finish date & time, facility, and the user's enrollment status.
8.	To return to the development plan, Click the **Return to Development Plan** button.

From the development plan, a user can also view a list of all learning activities he/she is currently enrolled.

Viewing Current Enrollment

Step	Action
1.	Click the **Development Plan** link on the left navigation bar.
2.	Select from the Filter drop-down menu: **Current Enrollment.**
3.	A list of Learning Activities the user is currently enrolled will be displayed.
4.	To view the Schedule Instance's Detail Page, Click the **Schedule ID**, a new window will display its details.

Enrolling in Schedule Instances

A **schedule instance**, or instance, is a specific scheduled learning event. For example, a schedule instance might be "the HR101 class scheduled for October 15 in Room 320 at the Main Office." Schedule instances may also exist for online components. If an online component/learning activity is only available at a scheduled time and date, a user will need to enroll in the schedule instance to participate. For example, a Forestry training course available online is restricted for users to the following times Mondays, Wednesdays, and Fridays from 8-10:00am EST

Users may self-enroll into a Schedule Instance from the **Development Plan** page (*or from the Catalog: see Section IV: Shopping*) if their agency allows self-enrollment. When a user enrolls, AgLearn places him/her on the list of students that will participate in a schedule instance of learning. If a schedule instance is full, the user will be added to the waitlist. When space becomes available, he/she will be moved to an enrolled status and placed on the participants list. If an agency or specific schedule instance does not allow users to self-enroll, they can request to be enrolled in an instance of the component. This is called a component request. A component request is made by a user asking approval from their supervisor or training officer to be enrolled into a schedule instance.

Users that self enroll into a schedule instance have the option to unenroll themselves as well. After users enroll or unenroll themselves, a notification will be sent anytime their enrollment status changes. Below is a description of statuses that are provided when a status change is made:

- **Enrolled:** User successfully reserved a seat in a Schedule Instance.
- **Pending:** Some scheduled instances may require a supervisor's approval. Once a user selects to enroll, the supervisor/training officer will receive an email to approve the enrollment. An email will be sent to the user letting them know when the enrollment has been approved.
- **Waitlisted:** If a course is full, the user is put on a waitlist, and will be moved into the course as seats open up due to unenrollment.

Below are step-by-step instructions for self-enrollment and submitting a component request.

Enrolling in Schedule Instances

Step	Action
1.	Click the **Development Plan** link on the left navigation bar.
2.	Select from the Filter drop-down menu: **Component**.
3.	Click the **Component Title** link for the component to be enrolled.
4.	Click the **Search Schedule** link to see available schedule date and times.

5.	The **Enrollment Options** window will display a list of each upcoming schedule instance for the component.
6.	With the permission of the training officer to enroll in the instance, Click the **Enroll** link that corresponds to the instance to be enrolled Note: If there is no **Enrollment** link that means one of two options: Self-enrollment is not permitted in the schedule instance (contact the training supervisor for approval) or there is no schedule instance currently available.

Deleting Components on Development Plan (Unenrolling)

Users can unenroll themselves from training activities that are not required on their development plan. Required training activities/components determined by the training officer or eLearning point of contact may not be deleted from user's development plan. If a user does want to remove a required training activity/component, their training officer will need to do it for them.

Deleting Component on Development Plan

Step	Action
1.	Click the **Development Plan** link on the left navigation bar.
2.	Select from the Filter drop-down menu: **Components**
3.	A list of components available to choose from will be displayed.
4.	Components the user is currently enrolled for will have the **Delete** button next to it if they are not required learning activities. Note: Users cannot delete components that are required by their training officer.
5.	Click the **Delete** button next to the appropriate component to delete.
6.	A Microsoft Information message will pop-up, "are you sure you want to remove the component from the development plan?" Click the **OK** button**.**
7.	Verify the Component was deleted from the development plan.

Component Requests

Users may find that a schedule instance of a component (learning activity) is not available for self-enrollment. If that is the case, users can request to enroll in a component from their development plan by following the step-by-step instructions below. Once a student requests to add a component, his/her supervisor will review the request and approve/disapprove the user to participate in the training. Once the request has been approved, the component can be added to the development plan.

Requesting Components

Requesting Components

Step	Action
1.	From the Development Plan, click the **Component Title** to open the Component Detail window.
2.	Click the **Request Component** button. The system will display the **Request Component** window, with the selected component indicating Revision Date, Requested Date, with Component Type and ID. Comments may be added.
3.	Enter the **Required Date** in the textbox**.** The Required Date is when the request must be approved/disapproved by.
4.	Enter the **Required Reason** in the textbox**.** The Required Reason is an explanation from the user why they need to be enrolled in this training.
5.	Click on the **Request** button. The system will prompt the user when the request has been successfully processed.

Users may view their list of components requests by performing the following steps:

Viewing Component Requests

Viewing Component Requests

Step	Action
1.	Click the **Component Requests link** on the left navigation bar.
2.	A list of components requests submitted will be displayed.

Qualification Status

A Qualification is a group of learning activities (components) and/or subqualifications that are usually related to the same job, skill, or specialty. Users may have one or multiple qualifications assigned to them. Based on the learning history of learning activities completed by the user, a qualification will have one of two qualification statuses:

- **Complete** - To achieve a 'Complete' qualification status, all components and sub qualifications that make up the qualification must be completed successfully by the user. ** If a component has a retraining interval associated with it, the user will have to re-complete the training event prior to the retraining interval in order to maintain the 'Complete' status.
- **Incomplete** - If all of the components and subqualifications that make up a qualification are not successfully completed, then an 'Incomplete' status will be shown until all of the requirements are completed successfully. **A qualification status for a qualification may become 'Incomplete' if any of the components which require periodic retraining have expired.

Viewing Qualification Status

To view the component details and status for the qualifications, including completion status of components and sub qualifications, follow the step-by-step instructions below.

Viewing Qualification Status

Step	Action
1.	Click the **Qualification Status** link from the left navigation bar.
2.	Click the **Component Title** (link) for the component to view, a new window will be displayed with the component's details.

SECTION II: LEARNING REQUESTS

This section allows a user to record and view learning activities that are completed. When a learning activity is completed, it must be updated in the system as ‘complete’. Once the system identifies a completed component on the development plan, it will be moved and added to the user’s Learning History. The Learning History Page stores a list of all completed activities. Users can view course titles, dates, grades, and other details for each of their learning activities listed.

Within the Learning Requests section, a user can perform the following functions:

- Learning History
  - View History of Completed Learning Events
- Record Learning Events
  - Record a Component
  - Record a Non-Component
- Manage Development Plan
  - Add Components
  - Remove Components
- Enrollment Assistant
  - Enroll One or Many Students
  - Unenroll One or Many Students

Learning History

When a component (learning activity) has been added to a user’s development plan, he/she would enroll into a schedule instance, and then in some way complete the component. To complete the component; it may be a manual read, online content launched, or a seminar attended. Whatever the component type, the successful completion of the component needs to be recorded as ‘complete’ in the AgLearn system.

When a user completes a learning event, he/she will need to verify that the event is added to the Learning History page as ‘complete’. A learning event may be recorded manually by the user, the user’s training supervisor, or training officer. Some components will automatically set the component status to ‘complete’ once a user has successfully finished, for example an online course or exam. If the component is not automatically updated in the system, depending on the business rules of the agency users may be permitted to record their own learning completion or their supervisor will need to do it for them. Please check with the agency’s training officer for further guidelines on recording learning events.

Viewing the Learning History

The Learning History page displays all successfully completed components (learning activities/events) that are recorded in the AgLearn system. It also lists details such as the instructor and grade for each completed learning activity/event.

Viewing Learning History

Step	Action
1.	Click the **Learning History** link on the left navigation bar.
2.	A list of completed Learning Events will be displayed.
3.	(Optional) To print the details of a completed Component, click the **Print** button.
4.	(Optional) If the component has online content, click the **Yes** link next to the component to view the details for the content object completed.

Record a Learning Event

The learning event recorder is a wizard that takes the user through each step for recording a component or non-component learning event. A component learning event is any unit of learning that is managed by the user's organization in the AgLearn system. A non-component learning event is any unit of learning that is not managed in the AgLearn system by the user's organization. If a non-component learning event is completed successfully, it may still be entered into the system to receive credit as 'complete'.

Recording a Component

Once a learning event is recorded, the learning event will move from the development plan to the Learning History. In some cases, a component will remain on the development plan even after a learning event has been recorded. This indicates to the user that the component has a retraining interval. Check the required by date to verify when the retraining interval must be completed.

Recording a Component

Step	Action
1.	Click the **Record Learning Events link** on the left navigation bar.
2.	Click the radio button: **Component**
3.	Click the **Continue** button.
4.	Select the **Component Type** from the drop-down menu. OR Search for the **Component ID:** • Click the Blue Search Icon next to the Component Type textbox.

	• Enter the search criteria for the Component ID • Click the **Search** button • Click the **Select** button next to the selected Component ID • The Component Type and ID textbox will be populated with the selected component's details.
5.	Enter the **Component ID** for the component in the textbox.
6.	Enter the **Revision Date** in the textbox.
7.	Enter the **Title** of the learning event in the textbox.
8.	Click the **Continue** button.
9.	Enter the **Instructor ID** in the textbox. OR Search for the **Instructor ID**: • Click the Blue Search Icon • Enter the search criteria for the Instructor ID • Click the **Search** button • Click the **Select** button next to the selected Instructor ID
10.	Select the **Completion Status** from the drop-down menu.
11.	Enter the **Completion Date** of the learning event in the textbox OR • Click the Calendar Icon • Select the **Completion Date**
12.	Enter the **Completion Time** of the Learning Event in the textbox.
13.	Enter the **Time Zone ID** in the textbox. OR Search for the **Time Zone ID**: • Click the Blue Search Icon • Enter the search criteria for the Time Zone ID • Click the **Search** button

	• Click the **Select** button next to the selected Time Zone ID
14.	Enter the appropriate information in the remaining textboxes. Note: Only the textboxes labeled with a red asterisk (*) are required, but it is suggested to enter as much information known.
15.	When finished entering information in the textboxes, click the **Continue** button.
16.	Enter the user's Event **Grade** and **Comments** in the textboxes.
17.	Select the **Status** from the drop-down menu.
18.	Click the **Continue** button.
19.	Verify the recorded event. If changes need to be made click the **Previous** button. When finished entering the recorded event, click the **Finish** button.

Recording a Non-Component

Users can record a learning event that is not tracked by his/her organization in the AgLearn system. These events are recorded as a non-component learning event. A user can determine if a learning event is a non-component if the event is not found in the AgLearn system. A user can search for the learning event under the **Catalog** section. If the activity is not found it is most likely a non-component.

Recording Non-Component

Step	Action
1.	Click the **Record Learning Events** link on the left navigation bar.
2.	Select the radio button: **Non-Component**
3.	Click the **Continue** button.
4.	Enter the non-component **Description** in the textbox.
5.	Click the **Continue** button.
6.	Enter the **Instructor ID** in the textbox. OR Search for the **Instructor ID**:

	• Click the Blue Search Icon • Enter the search criteria for the Instructor ID • Click the **Search** button • Click the **Select** button next to the selected Instructor ID
7.	Enter the **Default Grade** in the textbox.
8.	Enter the **Completion Date** of the learning event in the textbox OR • Click on the Calendar Icon • Select the appropriate date
9.	Enter the **Completion Time** of the learning event in the textbox.
10.	Enter the **Time Zone ID** in the textbox. OR Search for the **Time Zone ID**: • Click the Blue Search Icon • Enter the search criteria for the Time Zone ID • Click the **Search** button • Click the **Select** button next to the selected Time Zone ID.
11.	Enter the appropriate information for the remaining textboxes in the textboxes provided. Note: Only the textboxes labeled with a red asterisk (*) are required, it is suggested to enter as much information known.
12.	Click the **Continue** button.
13.	Enter the Student's Event **Grade** and **Comments** in the textboxes.
14.	Click the **Continue** button.
15.	Verify the recorded learning event, if changes need to be made click the **Previous** button. When finished entering the recorded learning event, click the **Finish** button.

Manage Development Plan

Users can manage their development plan by adding and removing components (learning activities) using the **Manage Development Plan** link on the AgLearn screen. If the user is a supervisor in the AgLearn system, he/she can manage other users' development plans in addition to his or her own.

Adding Components

When a component is added to a user's development plan it represents a unit of learning that is to be completed by the user. For example, a manual to read online, an exam to complete, or an instructor-led course to enroll. Components are learning activities that are added to a user's development plan to enhance his/her learning.

Adding Components

Step	Action
1.	Click the **Manage Development Plan** link on the left navigation bar.
2.	Under the Add Students Section; Click the **add one or more from list** link.
3.	Click the appropriate **Add** checkbox(s) next to the user(s) that will be adding the component to their development plan.
4.	Click the **Add** button. The user will return to the Add Students Page.
5.	Click the **Continue** button.
6.	Select the correct button: **Add Components.**
7.	Click the **Continue** button.
8.	Under the Select Component to Add section, click the **add one or more from list** link.
9.	Enter the search criteria for the component to be added to the development plan in the textboxes provided.
10.	Click the **Search** button.
11.	Click the appropriate **Add** checkbox(s) to add component(s) to the development plan.
12.	Click the **Add** button. The user will return to the Add/Remove Components page.
13.	Click the **Continue** button.

14.	Enter the **Component Type** in the textbox OR Search for the **Component Type:** • Click the Blue Search Icon • Enter the search criteria for the Component Type • Click the **Search** button • Click the **Select** checkbox(s) next to the selected Component Type.
15.	Enter the **Assign Date** OR • Click the Calendar Icon • Select the **Assign Date**
16.	Click the **Continue** button.
17.	Enter the **Required Date** OR • Click the Calendar Icon • Select the **Required Date**
18.	Click the **Finish** button. The user will be taken to the Status page indicating that the component was successfully added to the user's development plan.

Removing Components

If a user does not need to complete a specific component for whatever reason, the component can be removed from the development plan.

Removing Components

Step	Action
1.	Click the **Manage Development Plan** link on the left navigation bar.
2.	Under the Add Students Section; Click the **add one or more from list** link.
3.	Click the appropriate **Add** checkbox(s) next to the user(s) that the

	component will be removed from their development plan.
4.	Click the **Add** button. The user will return to the Add Students Page.
5.	Click the **Continue** button.
6.	Select the correct button: **Remove Components.**
7.	Click the **Continue** button.
8.	Under the Select Component To Remove section, click the **add one or more from list** link.
9.	Enter the search criteria for the component to be removed in the textboxes provided.
10.	Click the **Search** button.
11.	Click the appropriate **Add** checkbox(s) to add component(s) to the remove components list.
12.	Click the **Add** button. The user will return to the Add/Remove Components Page.
13.	Click the **Finish** button. The user will return to the Status page.

Enrollment Assistant

The Enrollment Assistant helps users and supervisors manage the enrollment and unenrollment in to schedule instances. When supervisors use the assistant, they can enroll/unenroll multiple users at the same time.

In order for a user to be placed on the participants list of a schedule instance, he/she must enroll for the specific instance. If a user enrolls for a schedule instance that is full, he/she will be placed on a waitlist and receive notification if a seat becomes available.

Enrolling One or Many Students

Enrolling One or Many Students

Step	Action
1.	Click the **Enrollment Assistant** link on the left navigation bar.
2.	Select the correct button: **Enroll Students**

3.	Click the **Continue** button.
4.	Enter the **Schedule Instance ID** in the textbox. OR Search for the **Schedule Instance ID** • Click the Blue Search Icon. • Enter the search criteria for the Schedule Instance • Click the **Search** button • Click the **Select** button next to the appropriate Instance
5.	Click the **Continue** button.
6.	Under the Add Students Section; Click the **add one or more from list** link.
7.	Click the appropriate **Add** Checkbox(s) to user(s) to be enrolled.
8.	Click the **Add** button. The user will return to the Add Students Page. Note: Verify the drop down menu option is ENROLL.
9.	Verify the appropriate users were added. Click the **Continue** button.
10.	Enter **Comments** to edit the assignment, if applicable, for each user in the provided textbox(s).
11.	Click the **Continue** button.
12.	Edit the **Financial Data** in the appropriate fields, where applicable.
13.	Click the **Continue** button.
14.	From the Record Enrollment page, use the checkboxes to indicate whom to send email notifications: • **Student** (required) • **Instructors** • **Supervisor** • **Others**
15.	Verify the Recorded Enrollment. • If changes need to be made click the **Previous** button.

	• When finished entering the Recorded Enrollment, click the **Finish** button.

UnEnrolling One or Many Students

If a user enrolls into a schedule instance but for whatever reason cannot attend the instance, he/she may unenroll from it. Depending on the agency's policy, an agency may or may not allow self-enrollment. If self-enrollment is prohibited, a user's supervisor or training officer will need to unenroll the student.

Enrollment Assistant: UnEnroll One or Many Students

Step	Action
1.	Click the **Enrollment Assistant** link on the left navigation bar.
2.	Select the correct button: **UnEnroll Students**
3.	Click the **Continue** button.
4.	Enter the **Schedule Instance ID** in the textbox. OR Search for the **Schedule Instance ID** • Click the Blue Search Icon. • Enter the search criteria for the Schedule Instance • Click the **Search** button • Click the **Select** button next to the appropriate Instance
5.	Click the **Continue** button.
6.	Under the Add Students Section; Click the **add one or more from list** link to unenroll user(s).
7.	Click the appropriate **Add** checkbox(s) to select the user(s) to be unenrolled.
8.	Click the **Continue** button.
9.	From the Record Unenrollment page, use the checkboxes to indicate whom to send email notifications: • **Student** (required) • **Instructors**

	• **Supervisor** • **Others**
10.	Verify the Recorded Enrollment • If changes need to be made click the **Previous** button. • When finished entering the Recorded Enrollment, click the **Finish** button.

SECTION IV: SHOPPING

The Shopping section is the main place a user can view, search, and enroll for training activities, also known as components, using a catalog. Once a user finds a component he/she wants to participate in, he/she may add the component to their development plan or request for the component to be scheduled. In addition, a user can search and launch web-based activities from catalogs, which allow users to take learning activities via the Internet.

Within the Shopping section, a student can perform the following functions:

- Catalogs
  - Search Catalogs for Components
  - Add Components to a Development Plan
  - Launch web-based Components
  - Request Components to be scheduled

Catalogs

A user can view and search only catalogs that are assigned to their domain or organization. Domains and organization are designated by a user's training officer or eLearning point of contact.

Catalogs contain components that are units of learning managed in the AgLearn system. Users can search the catalog for components and its associated scheduled instances by subject area or component title. Course offerings in a catalog are determined by the agency's affiliation within USDA and the training offered by the agency. If additional information is needed, please talk with the training officer about the course offerings available.

Searching Catalogs for Components

When searching the catalog for components, one of the search criteria is Classification. Components can be classified as Online Components, Time Based, or Physical Good. It helps to know what type of content to search for in order to narrow the search results. Below is a description of classifications:

Classification Descriptions

Field	Description
Online Component	This Component has online content and available via the Internet. Some online components are self-paced.
Time-Based Component	This Component can be scheduled, but may also contain online content for students to launch. These components often

	contain both schedule instances to attend, and online content to complete.
Physical Good	These components are meant to be ordered. Therefore, an order must be placed to "purchase" this component.

Adding Components to a Development Plan

In addition to components being required for a user to complete on his/her development, the user may enroll in additional learning activities (components). These additional learning activities are added by the user and are not required by the training officer to be completed. Before adding a component to a user's development plan, it is suggested to first view the component details to ensure no prerequisites are required. Please contact the agency's training officer for the policy on adding optional components to a user's development plan. Some agency's may require a user's supervisor to approve this training.

Adding Components to a Development Plan

Step	Action
1.	Click the **Catalogs** link on the left navigation bar.
2.	Select the appropriate **Classification** radio button to search for the Classification Type.
3.	Select the **Component Type** from the drop-down menu.
4.	Enter the appropriate information in the **Subject ID contains** textbox.
5.	Click the **Search** button.
6.	From the Search Results page, click the **Component Title** link to view the Component's Details page.
7.	Click the **plus** (+) icon to see available schedule and purchasing costs for the selected component.
8.	To add the component to the user's development plan, Click the **Add to Dev Plan** button.

Launch Web-based Components

Web-based components are classified under the “Online” Classification. These components can be launched from the user’s development plan at any time and are self-paced.

Launch web-based Components

Step	Action
1.	Click the **Catalogs** link on the left navigation bar.
2.	Click the **Online Only** Classification radio button.
3.	Select the **Component Type** from the drop-down menu.
4.	Enter the appropriate information in the **Subject ID contains** textbox.
5.	Click the **Search** button.
6.	From the Search Results page, click the **Component Title** link to view the Component’s Details page.
7.	To view the component’s online contents, Click the **launch** button.
8.	Click the link(s) provided to open the online contents.
9.	Once an online component is launched, the Course Structure page will be displayed. This will list each launchable piece of content or the **Content Object**. Note: Components often have more than content object.
10.	Click on each link provided to launch the next section of the content object. Note: The user may exit the course structure page and logout of AgLearn before completing the course. The system will "remember" the content objects already completed.

SECTION V: SUPERVISORS

The relationship between supervisors and their subordinates plays an important role in the AgLearn system. Through this relationship, supervisors have the ability to manage and develop training for each user under their supervision. A user's training supervisor, assigned in the AgLearn system, may be different from the supervisor he/she reports to on a daily basis. A supervisor in the AgLearn system only manages the user's training and leaning needs.

As a training supervisor in the AgLearn system, the following functions can be performed:

- View user records
- Manage user development plans
- Enroll (or unenroll) users into/from Schedule Instances
- Run a variety of reports from a user's records, their own personal student record, or a report that includes both

Viewing Student Records

Supervisors can view student records while logged into the AgLearn system under their own user name and password. However, they are only permitted to view their own record and those of students under their direct supervision. To view a student's learning information, click the Viewing link above the top navigation bar on the AgLearn screen. If no Viewing link is displayed on the screen, this indicates to the student that he/she currently has no students under his/her direct training supervision and cannot perform the functions of a supervisor.

Viewing a Student Record as a Supervisor

Step	Action
1.	Click the **Viewing** link at the top of the screen
2.	Click the appropriate radio button(s) for the user(s) records to view.
3.	Click the **Submit** button.

To return to the supervisors own record, click the Viewing link. Then click the Back to Self link and the user will return to their Student Information page.

Manage Development Plans

From the **Manage Development Plan** link on the left navigation bar, supervisors can add training to their users' development plans. This is a fast way for supervisors to add a learning activity (component) for their user(s). Once a learning activity has been added, AgLearn will record this task as completed by the supervisor and displays the supervisor's name and ID in the column indicating who added the record. Please reference the **Management Development Plan** section of this User Guide for step-by-step instructions on how to add a learning activity/component to a development plan.

Enrollment Assistant

Supervisors can enroll (or unenroll) users into schedule instances while logged into AgLearn under their own user name and password. When supervisors launch the Enrollment Assistant, they can also enroll /unenroll users (under their supervision) into/from a schedule instance.

The **Enrollment Assistant** link on the left navigation bar of the AgLearn screen is a tool that provides the supervisor a way to enroll (or unenroll) a batch of users into/from the same schedule instance. When using the assistant, supervisors have the option to enroll/unenroll multiple students at a time. Please reference the **Enrollment Assistant** section of this User Guide for step-by-step instructions on how to enroll/unenroll users.

Reports

The **Reports** link on the left navigation bar allows supervisors to run a variety of reports on users under their supervision, their own record, or a report that includes both. Reports can be generated and customized to show select information about users. Please reference the **Reports** section of this User Guide for step-by-step instructions on how to run reports.

For additional information regarding the functions a supervisor can perform in the AgLearn system, please reference the Supervisor Job Aid.

APPENDIX I: GLOSSARY

A

Account Code: Is the unique code used to track charge back information of a transaction for the ledger.
Active: An active record is one that is currently available to be updated, fully functional, and will appear on reports. To change the status of a component or to view, edit, and report on an inactive record, the system administrator must grant the user a security privilege to do so.
Active Locale: Think of an active locale as a language with unique syntax and patterns for numbers, date and time specifications, and standards for labels as well. AgLearn has locales IDs: English, French, German, Japanese, Chinese, and Spanish. Of course these can be expanded.
Activity (Instance): A non-component activity you have placed on the learning calendar. Typical activities include instructor vacations, location unavailability, meetings, workshops, and course development activities. Activities allow you to indicate periods of time during which various resources are unavailable. Activities are similar to schedule instances in that they are both events that appear on the learning calendar. You can create and define activity types to suit your needs in the Activities subsection of the General References section (References section).
Admin User ID: The Admin User ID is used when a student un-enrolls him/herself and another student from the waitlist is automatically picked by the system for enrollment. Since the system is automatically updated, it requires an Admin User ID for auditing purposes.
AICC: Airline Industry CBT Compliant. This is the emerging standard for online courseware that guarantees interchangeability and data exchange capability between online learning development packages and players. AgLearn is capable of level-1 compliant exports to AICC courseware and can import AICC courseware.
Associated Costs: Associated costs are any cost of conducting a segment of a component that have not been defined in AgLearn as instructor costs, material costs, equipment costs or location costs. You can define associated costs in the Associated Costs subsection of the General References section. Examples might include food, clean-up, or travel; and any cost of instructors, material, equipment or location that is in addition to costs for these resources that have already been defined in AgLearn. When defined in the General References section, you can optionally specify a cost amount for the type of associated cost you are defining. However, in many cases associated costs are not very predictable; you are not required to define a cost per hour.
Automatic Processes Module (APM): Automatic processes are processes that can be set up to perform certain housekeeping and notification processes when a user logs in or at other scheduled intervals. Here are the names of all the available automatic processes; their names give a hint as to what they accomplish: Instance Delivery Inventory Reorder Qualification Clean-up Training Expiration Waitlist to Request List Reset Online Component

B

Background Jobs: Background Jobs are time-consuming processes that are scheduled to run at another time as asynchronous events. The number of records defined in the selected job MUST exceed the predefined threshold (Maximum Record Count for Online Operation) set for running background jobs. The system administrator will configure AgLearn to indicate the Maximum Record Count for Online Operation for your organization.

C

Cancellation Policy: The Cancellation Policy is the set of rules used by the system to calculate what the student is charged upon canceling the schedule instance of a component or activity.
Catalog: A collection of components and materials. Catalogs can be grouped by domains and/or organizations.
Class: An entity in AgLearn that associates student(s) with a set of schedule instances. It is used to help teach administrators to put together students to go through a set of schedule instances. It makes reporting and scheduling of the group much easier. While emphasis is placed on the union of students and related schedule instances, it is important to note that you could have one without the other in a class.
Classification: There are three types of classifications of components in AgLearn: Instructor-lead, online, and physical good. Physical goods may include items such as books, documents, etc.
Completion Status: A completion status indicates whether the student has successfully completed a learning component. If course or learning credit is granted for the successful completion of certain components, the completion status should also be designed so that it indicates whether or not credit was awarded.
Component: A learning requirement that can be content, an exam, a survey OJT, or external certification. A component can be a Physical Good, Online Component, and Time based which is generally instructor-led.
Component Source: A component source typically identifies something about a component that has to do with its origin. You can use component sources to identify the developer or author of the component, the organizational or regulatory body that requires the component, or for some other type of information that you define to best suit your needs (e.g., OSHA, 21CFR, Internal, etc.) When you define component sources, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of component sources also helps to speed up searches and queries.
Component Type: Component types are categories of training activities that your organization defines to satisfy your needs. Typical component types include course, class, certification, OJT, interview, etc. When you define component types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of component types also helps to speed up searches and queries. Component types are established and maintained in the Component Types subsection of the General References section.
Contact Hours: The number of hours students were receiving instruction during a schedule instance. For example, a component that begins at 8 AM and ends at 5 PM is nine hours in duration, but you may want to capture the fact that only eight hours of actual instruction took place because of an hour lunch break. The delineation between contact hours and total hours allows you to keep an accurate record of the hours spent in training versus the total hours during which the resources were in use. Contact hours associated with a component are defined when the component is created.

Content Object: A content object is a record that contains instructions specifying where to find and how to launch a unit of online content such as a course, demonstration, exam, tutorial or other online application whose content is intended for students. You may create online applications "in-house" using courseware development software or they may be purchased; but in either case, you must create a content object for the application in this window. Since each content module always has a one-to-one relationship with an actual online application (files or URL addresses),and since each content module must have a title, you may often think of content objects as being synonymous with the unit of online content to which it refers. One or more content objects can be included in a component, so that a single online component may be composed of several online content applications.

Content Player: Any software application that is used by a student workstation to open and to play an online content object. Software such as Notepad or Microsoft Word can be used as a content player, depending on the type of content files prepared by your online courseware developer that have been included in a given content object.

Copy Daily Segments: Use this link to duplicate an entire day full of segments. If you have created segments that occur on the same day, all the segments that fall within that day will be duplicated. Also, all of the data will be duplicated as well. You can then edit the duplicate segments to suit your schedule.

CPE: Credit for Professional Education. A type of credit for completing a component.

Credit Hours: Credit hours provide a method of accounting for a student's successful completion of components. Any number of credit hours can be associated with each learning component in accordance with the needs of your organization. When the student has earned a successful completion status through their participation in a component, the credit hours are awarded to the student.

Critical Needs: Critical needs are learning needs that have expired, are overdue, or will expire within the qualification expiration notification threshold set by the system administrator.

Currency Pattern: The currency pattern is used to indicate the default format for currencies used in the selected active locale.

Custom Report: Custom reports allow you create customized reports specific to your learning organization. The reports you develop are then easily run in AgLearn. For each custom report you create, you MUST provide a report definition and a Configuration for the report pipeline in order for the new report to work properly. The Definition of the report has three major parts: Criteria, Report Queries, and the Report UI. The Criteria is the representation of what the user will see on the initial report page. The Report Queries comprise the Standard Query Language (SQL) that is used to pull the report data from the back end. The Report UI will define the presentation of the results of the report after it comes back from the database.

D

Days Remaining: Number of days remaining before the expiration of the Required Date for completing a specific component.

Decimal Pattern: The decimal pattern is used to indicate default format of whole integers with specified decimal places used in the selected active locale.

Delivery Method: The instructional method used to deliver learning. Examples might include Instructor-Led Training, Computer-Based Training, On-The-Job Training, and Self-Study. However, delivery methods are defined by your organization to suit your specific needs. When you define delivery methods, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of delivery methods also helps to speed up searches and queries.

Delivery Offset Days: The number of days prior to the scheduled delivery date of the selected component/material.

Development Plan: The development plan is a list of the components that a student must complete, and target or deadline completion dates for each. To view the development plan for any student, bring the student's information into view in the Students section, and choose the Development Plan tab.

Document: Any media item (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created, enabling it to be tracked by AgLearn Administrator. Documents are associated to components, to qualifications, and/or to tasks. Document revisions may have an impact on any of these, and when you record a document revision, the component, qualification and task records to which it is linked will be flagged for review with respect to its relationship with the document.

Document Type: Document types are categories your organization sets up for the printed materials used in training documents, based upon your needs. Examples may include Vendor Manual, Regulation, Corporate Policy, and Job Aid. When you define document types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of document types also helps to speed up searches and queries. Document types are created and maintained in the Documents section of the General References section.

Domain Restriction: The domain restriction is used by administrators to set limitations on workflows in order for users to access only domains that are predefined in the set of restrictions applied. See workflow.

Domain Type: Domain types are record types that can be assigned to a domain. If a domain includes a particular domain type, then records of that domain type can be assigned that domain. For example, if a domain includes the Organization domain type then organization records can be assigned that domain. The domain types are: Students, Components, Qualifications, Competencies, Proficiency, Profiles, Schedule Instances, Facilities, Locations, Equipment, Instructors, Tasks, Documents, Tasks, and Organizations.

Domains: Domains are created by your system administrator, and are used to control access to data.

E

Effective Date: The date when a new or revised component will be used for the calculation of component completion statuses and qualification statuses. When you create a component, the default effective date is the current date; but you may decide to set it to a future date since the qualification status of any student who is assigned the qualifications to which you are adding this new component would become "incomplete" as soon as the component is added. By making the effective date a future date, you are defining a "grace period" to allow students to complete the new component in the time allotted, without losing their qualification.

Employee Status: Employee statuses are student categories that are created by your organization to suit your needs. Typical employee status codes might include Full Time, Part Time, Temporary, and Contractor. When you define employee statuses, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of employee statuses in the Employee Statuses subsection of the General References section also helps to speed up searches and queries.
Employee Type: Employee types are student categories your organization defines to suit your needs. Typical examples of employee types include Exempt, Hourly, and Contractor. When you define employee types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of employee types in the Employee Types subsection of the General References section also helps to speed up searches and queries.
Enroll: To place a student's name on the planned list of participants in a specific course instance. In other systems this may be called 'registration'. There are three enrollment statuses in AgLearn: *Active Enrollment* - This is the list of students for whom a seat is reserved for a specific instance. *Waitlist* - This is the list of people who are trying to enroll in a specific instance of a course when enrollment has already reached maximum capacity. AgLearn does not automatically add waitlisted students to the active enrollment list when there are cancellations; but instead allows you to decide which waitlisted student(s) should be moved to the active enrollment list. You can use the Waitlist to Request tool in the Automatic Processes section of System Admin to periodically create enrollment requests for students who were on a waitlist status and the instance they were waitlisted for has already begun. *Request List* - This list contains students whose need for a particular component has been identified, but who have not yet been enrolled or waitlisted against a particular instance. The request list might include, for example, students who have a requirement for the learning event but who cannot attend any of the currently scheduled instances of the component because of scheduling conflicts.
Enrollment Status: Enrollment statuses are categories that your organization creates and defines which describe a student's status with respect to enrollment in a particular schedule instance. You can create as many enrollment statuses as required within each of the four enrollment types. When you are selecting an enrollment status in AgLearn, the first letter of the enrollment type for that status is displayed in parentheses after the enrollment status description. The list of enrollment statuses are maintained in the Enrollment Status subsection of the General Reference section. Default enrollment statuses are assigned to enrollment types in the Enrollment Statuses subsection of the Application Admin section (SystemAdmin area).
Equipment: Physical resources used in the delivery of training that are typically used over and over. Examples of equipment might include overhead projectors, television monitors, and VCR players. Equipment is a distinct resource category from materials, that are consumable in nature (i.e., cannot be used over and over).
Equipment Status: The current status of a given piece of equipment, as defined by your organization in the Equipment Status section of the General References section to meet your needs. Examples might include Operational, On Loan, and Inoperative. You determine which equipment statuses reflect that a piece of equipment is available to be scheduled for use, and which statuses reflect that equipment cannot be scheduled. Equipment status data is then used by AgLearn to provide a reliable list of available equipment for scheduling purposes, displaying only equipment with a status that allows for it to be scheduled.

Equipment Type: The category or type of a given piece of equipment. Examples might include Overhead Projector, VHS VCR, and Video Monitor - 25 inch. Equipment types are used by AgLearn to build the list of equipment that is available to support a particular instance when it is scheduled. By default, AgLearn will only display equipment of the type(s) that have been built into a component's scheduling defaults. The list of equipment types is maintained in the Equipment Types subsection of the General References section.
Exam/Survey Object: A database record, created in the Exam Objects section, that contains all the details of an online examination or survey including the questions and objectives included by the exam or survey, the percentage grade required for passing, electronic proctoring requirements, messages displayed to students before and after the exam, the exam's launch method, information about student usage and other software behaviors.
External Exam: An external exam is any exam that has been created with some tool other than Plateau Administrator and Plateau Question Editor. In order to use an external exam in an online component, typically, external exams are based on '.html' and therefore, the browser should be specified as the content player for an external exam. Student performance data (scoring data, passing, failing, etc.) on '.html-based' external exams, as well as related component performance data, is communicated to your organization's AgLearn database. It is strongly recommended that '.html-based' external exams be designed to include only one question per '.html' page, in order that the performance data can be sent to the AgLearn database.
External Reports: These reports are generated using third party tools and then run in AgLearn. They are part of the AgLearn legacy reporting tool. A new Custom Report is now available as part of the newly created Reporting Framework.

F

Facility: A facility is grouping of training locations. Facilities may be buildings, plants, branch locations, or some other way that makes sense for you to group locations. The locations within a facility can share the facility's workweek profile, holiday profile, equipment inventory (for equipment assigned to a specific facility but not to a specific location within the facility) and material inventory.
Force Incomplete: When you enable the “Force Incomplete" option for a qualification component, the system will calculate whether the status should be complete or incomplete based on the student’s latest attempt at completing the component. If the student’s latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt.
Formula: In the Cost Formula tab, you can add formulas for the selected cost name by entering either a Cost Formula or a valid Custom Cost Calculator.
Free-floating competency: A free-floating competency is a competency that is assigned to a student independently from the assignment of proficiency profiles to that particular student.
Free-floating component: A free-floating component is a component that is assigned to a student independently from the assignment of qualifications to that particular student.

G

Gap: The difference between a required mastery level and the student's current mastery level of a specific competency that is included in the student's proficiency profile. A negative gap indicates a learning need (i.e., the required mastery level is 4 and the student is assessed to have a mastery level of 3; therefore, the gap is -1 and a learning need exists.) You can view a student's gap information in the Proficiency Profiles tab of the Students section (Student area).
Grade: A value that can be used to indicate, for instance, a student's examination score associated with a learning event. AgLearn can now use grades to determine the completion status of a learning event. These settings are adjusted on the Grading Options tab of the Components section (Learning area). You may grade using either a numeric system or a value-based system.
Group Instance: A group instance is a grouping of existing schedule instances that all are associated with a particular group instance name. Group instances help you to ensure that if you need to keep a particular group of students together, enrolling them in the same schedule instances, you can more easily do so. By creating a group instance of a particular name, then assigning that name to students in a custom field of the Student section, for example, you can more easily select and enroll the correct students for the correct schedule instances.
Grouping: Grouping is a term that relates to the way report output is displayed. Many of AgLearn's report data collectors allow you to group data by various criteria in order to give certain features of the output greater visibility. For example, in the Student Qualification Status report, you can group by student to see the status of the qualifications by student, or you can group by qualification to see the status for all students who have been assigned that qualification. Report outputs contain appropriate headings for each group of output, and many of AgLearn's standard reports also give you the option of starting each group on a new page by inserting page breaks between each group.

H

Hints: A brief on the UI to remind the user of an example.
Holiday: Calendar dates defined by your organization, when training should not be scheduled at a learning facility. When you schedule an instance, AgLearn will not allow you to schedule the instance at a facility on a date that has been defined as a holiday, unless you override the default. When you schedule an instance having a duration of two or more days, AgLearn will skip over any holidays unless you override the default.
I18N (Internationalization): The process of developing and implementing the application so that it is easily adaptable to a specific local language and/or standards- localized. An example of the features in this process is ensuring data space so that messages/labels can be translated from languages with single-byte character codes (such as English) into languages requiring multiple-byte character codes (such as Japanese Kanji).

I

Initial Period: The number of days a student is allowed between the assignment of a learning requirement and the required completion of that requirement. For example, if a component is assigned an initial period of 30 days, whenever that component is assigned to a student, that

student has 30 days to successfully complete the component before their learning requirement becomes overdue. Each component can have an initial period assigned to it, and initial periods can be overridden on assignment.
Instance: A specific scheduled event, such as "the HR101 class scheduled for October 15 in Room 320 at the Main Office," for which a database record is created in the Schedule Instances section. Either of two types of events can be scheduled in an instance: components (during which learning of some sort takes place) and activities (non-learning events that are accounted for on the schedule of a student, instructor, or location; such as vacations, staff meetings, etc.).
Instructor: A person who delivers learning. Although any person can be indicated as an instructor when recording learning events, instructors managed in AgLearn can be assigned a list of components that they are authorized to teach, thus improving the process of selecting and scheduling instructors to deliver a specific component.
Integer Pattern: The integer pattern is used to indicate default format of whole integers used in the selected active locale.
Inventory Type: In AgLearn you can have two types of inventory: material or component.
Iteration (online exam): An attempt by a student to complete an exam. For exams and surveys created in the Exam Definitions section, iterations can be limited to one by specifying, on the Summary tab, that the maximum number of allowable attempts for the exam is one. You can make instructor or learning administrator intervention necessary between iterations by setting the Lock exam flags, also found on the Summary tab of the Exam Definitions section.

K

Job Location: The location where a student works. You can define job locations to be as specific as a particular assembly or production line, or in a more general way, such as a branch location, building, or country. When you define job locations, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of job locations also helps to speed up searches and queries.
Job Position: The student's job title or function. Examples may include Teller I, Manufacturing Technician, and Administrative Assistant. You can also include ranks or ratings in the job position, if it suits your needs. Job positions are important when assigning and tracking learning to students since their qualification status is often directly tied to their job position. When you define job positions, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of job positions also help to speed up searches and queries.

L

L10N (Localization): The process of adapting the application to a particular language, and desired local standards like date, time, currency, etc. AgLearn is an internationalized application: developed so that localization is relatively easy to achieve.

Label Links: Label links serve both to name the data entry field next to it (usually the link is just to the left of the field that it names); and as a tool to help you select the data you wish to appear in the field. When you click on a label button, a search page opens, allowing you to choose from allowable values.
Label: The value displayed describing a specific item on the UI of the application.
Locale: The locale is a specific language with unique syntax and patterns for numbers, date and time specifications, and standards for labels as well.
Location: A particular location within a facility where an instance (or a segment within an instance) of learning is delivered. Locations might be classrooms, simulators, or conference rooms. See also Location Types.
Location Type: Location types are categories that describe learning locations, which your organization defines to suit your needs. Typical examples might include Classroom, In-Plant Location, Simulator or Auditorium. Location type data is used by AgLearn to provide a list of suitable locations when you are scheduling an instance of a particular training component. By default, AgLearn will only display locations of the type(s) you have indicated are suitable for the component you are scheduling, but the default can be overridden if necessary so that you can also see locations of other types.

M

Master Inventory: The Master Inventory is used to store all of the components and schedule instances available in your LMS. Catalogs are populated from the master inventory.
Mastery Level: Rating given to a student that indicates his or her command of a specific competency. The rating scale that is used is established in the Competency Assessment subsection of the Application Admin section (System Admin area).
Materials: Consumable supply items that are used up during learning, such as pens, handouts, giveaways, etc. For each kind of material you decide to track, you create a material type and then assign the material type to a facility, establishing an inventory record for the material at a given facility. Material inventory levels are updated directly by editing the number on hand in the Materials tab of the Facilities section or the Inventory tab of the Material Types section.

N

Next Action Date: See Required Date.
Notification: Has proper email addresses for both the Sender and Receiver. It also has a Message as well as a Subject. These four elements form the notification. You may add attachments to the notification.
Notification Database Tag: Is the variable used in the notification templates and syntaxes that are substituted at run time with context-based data.
Notification Syntax: This is the notification tag definition or dictionary that is used to perform looping. The tags are variables that are populated at run time based on the context of the notification.
Notification Template: A pre-parsed message format that includes database tags to be populated at run time within a defined context. The templates may have multiple syntaxes.

Numeric Grading: Numeric grading is one of the options that can be used when grading components. For each component, you can establish several ranges of scores and associate each with a completion status. If a student achieves a score within a particular range on a component, then they are assigned the corresponding completion status. See also, Value-Based Grading.

O

Objectives: An objective is a generic learning object such as a grouping of questions that have been created in the LMS Objectives section or in Plateau's Question Editor application. Questions are associated with objectives on the Summary tab of the Questions section (Learning area) or by using AgLearn's Question. Normally, all of the questions in a given objective should measure the student's mastery of a small, closely related topic, process, task, or unit of instruction in an online component. One or more objectives make up a single content object or exam/survey; and one or more content object, or exam/surveys, make up an online component.

Offset: This term is used to schedule deliveries and other tasks throughout PWA. It is used in the Component and Scheduling modules to schedule the number of days before an instance begins that the corresponding material should be sent. When Editing the Scheduling Segments for a Component, the offset is used to determine the starting time of the segment based on the ending time of the previous segment. When Setting the Cancellation Policy, the "offset days" is used to enter the number of days that a reimbursement policy takes effect. for a cancelled scheduled instance.

Online Component: An online component is any component that is available for students to use as a CBT course. In AgLearn, you create an online component as you would create any other component, with the following two additional steps on the Online Settings tab of the Components section: You create a course structure that may include folders, objects, and exam/surveys. You specify that the component is available online.

Online Instance: When a student launches an online component for the first time, as opposed to launching an online component that he or she has already begun, an "online instance" of the component is launched. Once a learning event is recorded as a result of the student's completion of the online component, whether or not the associated completion status grants credit, a subsequent launch of the same online component by the same student creates a brand new "online instance" that can result in the recording of a brand new learning event when the component is eventually completed for a second time.

Organization: An organization is an entity of some type to which a student belongs. Organizations are user-defined to suit your needs. For example, you might choose a functional organization (Manufacturing, Administration Corporate QA), an accounting organization, an organization according to internal or external business units, or some other basis for defining organizations.

Organizational Group: An organization group is used ONLY as a search criterion for plowing through massive student records. It is a grouping of organizations.

P

Pattern: A Pattern is a format that determines the way that dates, time, and numbers are displayed throughout the application. Patterns are created and maintained in the Tools section.

Pattern Types: There are four pattern types for number formats: 1. Integer: This pattern type is used to indicate default format of whole integers.2. Decimal: This pattern type is used to indicate default format of whole integers with specified decimal places.3. Currency: This pattern type is used to indicate the default format for currencies4. Percentage: This pattern type is used to indicate the default format of the percentages.
Percentage Pattern: The percentage pattern type is used to indicate the default format of the percentages used in the selected active locale.
Post-work materials: Consumables that must be sent to students and/or instructors at some point after the scheduled instance of learning. Examples might include surveys, follow-up reading material, etc.
Pre-work materials: Consumables that must be sent to students and/or instructors at some point in advance of the scheduled instance of learning. Examples might include prerequisite reading material, pre-class skill assessment tool, etc.
Pricing Rule: The ID, description, and discount rate (percentage) for pricing items in the Master Inventory and catalogs.
Proctor: A proctor is an instructor who has been designated as an online examination monitor. Proctors are assigned proctor codes that enable them to unlock student machines in the event of certain events or conditions, such as a failing grade on an exam.
Proficiency Profile: A grouping of competencies that can optionally be associated with a job position, a duty area, or a function to help you manage the consistent assignment of proficiency profiles to students with similar responsibilities. You can create proficiency profiles to include minimum required mastery levels, helping you to identify gaps in a student's training. Proficiency profiles are created and maintained in the Proficiency Profiles section.
Profit Center: Refers to the entity/account that is being credited in the transaction.
Published Price: The price published for a selected item/component.

Q

Qualification: A grouping of components and/or sub qualifications that allows you to more easily assign a given set of learning components to a student, and to track the completion and maintenance of required learning.
Question: A question, generally speaking, is a single screen that appears in an exam/survey, giving students an opportunity to demonstrate their ability to distinguish the correct answer from among a choice of possible answers. Normally, all of the questions in a given objective should measure the student's mastery of a small, closely related topic, process, task or unit of instruction in an online component. One or more objectives make up a single content object or exam/survey; and one or more content object, or exam/surveys, make up an online component.

R

Region: A region is an entity within your learning organization that you create according to your organization's needs. Regions can be set up according to business line, geography, or some other criteria. Only two types of assets are directly assigned to regions: facilities and instructors.

However, regions can be very significant when you consider that if you assign facilities to regions, the locations, equipment and materials associated with the facility are also regionalized.
Request: A request is a notification that a student wants or needs to complete a specific component. A request does not place a student in active enrollment or on the waitlist for any specific instance that has been scheduled. Usually, requests are entered in the Requests tab of the Components section (Learning area), but there are a couple of circumstances where AgLearn will create requests: When a component is canceled, you will be asked whether you want to generate requests for the students that were enrolled or waitlisted for the instance. When a scheduled component that has a waitlist is delivered, a request can be generated for each student that was on the waitlist via the Waitlist to Request automatic process.
Required Date: The date by which all components related to the selected qualification must be completed.
Requirement Type: Requirement types are categories you can establish for components to help you to prioritize a student's learning needs by distinguishing between "need-to-have" and "nice-to-have" components. Typical examples of requirement types might include Required, Optional, and Regulatory. Requirement types are maintained in the Requirement Types subsection of the General References section. When you assign a requirement type to a particular component, it serves as a sort of "default requirement type" whenever the component is included in a qualification; however, you can override the default requirement type of the component once it is included in a qualification.
Resource: Resources are assets whose availability is essential to your ability to schedule an instance. AgLearn helps you to manage several types of resources: Instructor - The person responsible for delivering or facilitating training, whose schedule must permit him or her to be available during the instance to which they have been assigned. In AgLearn, instructors can be students that have additional qualification requirements, or they can be external to the organization. Location - A managed resource, most easily identified by its unique physical location, the availability of which is necessary for training delivery. Examples might include: classrooms, training trailers, practical laboratories, off-site training locations, and simulators. Locations can be grouped into facilities, which can make certain aspects of location management easier.
Retraining Interval: The number of days required before the student is to re-complete a recurring learning requirement.
Review Flag: A system-generated flag automatically created when a document is revised. The flag indicates that a component or qualification related to the document has not been checked for any potential conflicts between the current information and information that may have been added, deleted, or changed by the revision.
Revision Date: The date of origination, or the date of last revision, of a component. The revision date of one of the three parts of the component database key. If no revision date is specified, then the latest revision is assumed.
Role: A role is a combination of one or more workflows (mix of a function applied to an entity). One or more Roles comprise a User. See workflows.
Rule: Comprises of a Delivery Offset (Days) with a corresponding reimbursement price adjustment for the selected component or material.

S

Schedule Instance: A specific scheduled event of a component or activity for which a database record is created in the Schedule Instances section. Two types of schedule instances: component and activity.

Search Page Icon: A control that opens a search page where you can select an item. The item you select will fill in the corresponding field to the right of the icon.

Security Profile: Pre-defined sets of security (e.g., view, create, modify, etc.) permissions, called security functions, that are assigned to each user of AgLearn Administrator. The security profiles and domain privileges work together to define a user's permissions in the system. Security functions are associated with security profiles in the Security Profiles section of the System Admin area.

Segment: Unit of division of a course instance, based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways: Divided into five 8-hour segments, scheduled one segment per day for five days Divided into ten 4 hour segments, scheduled two segments per day for five days into four 10 hour segments, scheduled one per day for four days. Divided into any number of segments of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances. Thus, AgLearn gives you flexibility, which allows you to schedule a course that meets first for a two-hour segment in an auditorium, then for a three-hour segment in a classroom, even though the segments may have completely different instructor and resource requirements.

Sequence Numbers: Sequence Numbers indicate the order in which the student should complete the components that make up this qualification. The sequence number indicates the order in which components assigned to a qualification should be scheduled. This is important when creating a qualification schedule.

Shopping Account ID: A unique ID created for individual students and organizations to track their commercial transactions.

Slot: A slot is a reservation made by an organization for enrollments in a schedule instance. Names of specific students may not be available when the organization acquires slots, but at some point, names of students who belong to the organization that acquired the slots can be supplied. Slot requests are recorded using the Enrollment tab in the Schedule Instances section or by using the Enrollment Assistant tool; and slots are filled by student names using the same tools provided for enrolling students normally, such as the Enrollment Assistant tool or the Enrollment tab of the Schedule Instances section. Slots can also be associated with line items and be reflected in purchase orders.

Sorting: Sorting is a report-related term. Several of AgLearn's report data collectors allow you to sort data by various criteria in order to change the nature of the report. Sorting is a term that relates to the way report output is displayed. Many of AgLearn's report data collectors allow you to sort individual rows of report output data by various criteria to make it easier for you to find the data that is most interesting to you. For example, in the Student Qualification Status report, you can sort by completion date to see the most recently completed learning at the top of each output group, or you can sort by component ID to see all of the learning events related to each component right next to each other.

Student: ANY person for whom a record has been created in the Students section of the Student Management area (these are the records that appear and are created in the Students section), including employees, contractors, and others for whom you wish to keep learning records and to enroll in courses.

Subject Area: This is the area of concentration of the selected component or material. Examples of the subject areas may include Safety, Accounting, Manufacturing Process and Quality Assurance, depending upon your needs.
Supervisor: A supervisor is a student that has been designated to oversee another student's learning. A supervisor has the ability to log in to AgLearn Student Access on behalf of their students, and to view their students' learning information and assign learning to them. If granted permission by the system administrator, they can also record learning events for their students.
System Report: These are the standard reports that come with the AgLearn LMS. The system reports are part of the newly created Report Framework. The new framework gives you more options with respect to the format of the reports.

T

Target: Indicates whether the student or instructor should receive the material.
Task: A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in one of the following: - a finished product - a completed service - a change in the work environment. You can create records for tasks, which can then be related to components, competencies, to job positions, to job locations, and to documents. This results in greater visibility of the relationship between components and particular aspects of actual job performance (e.g., you can keep track of the tasks that are covered by an on-the-job (OJT) guide and its associated job performance measure (JPM).
Total Hours: The number of hours that the resources for a scheduled component are in use. For example, for a component that meets from 8am to 5pm, there may be eight hours spent in training (contact hours) but nine total hours, indicating the number of hours the resources are in use; the extra hour takes into account the lunch hour, a non-learning activity. The delineation between contact hours and total hours allows you to keep an accurate record of the hours spent in learning versus the total hours during which the resources were in use. Total hours associated with a component are defined when the component is created.

U

User: A user is anyone, with administrative access to the application, whose information has been recorded in the system. The system uses the user's information to restrict his/her access to the application. A user is comprised of one or more roles. See roles.

W

Waitlist: A list of students for whom no space currently exists in a scheduled instance. You can set up AgLearn Administrator such that students can be moved automatically from the waitlist to a request list using the Waitlist to Request tool in the Automatic Processes subsection of System Admin.
Work Weeks: Days of the week, defined by your organization, when learning can be scheduled at a facility. When you schedule an instance, AgLearn will not allow you to schedule the instance at a

facility on a day of the week that has been excluded from the workweek, unless you override the default. When you schedule an instance with a duration of two or more days, AgLearn will skip over any weekend or non-training days unless you override the default.

Workflow: A workflow is a combination of a function applied to an entity. An example of a workflow is 'View Students' i.e. the function 'VIEW' and the 'ENTITY' students. A domain restriction is applied to each workflow to restrict access to certain data. See Domain Restriction